Tourist profile trend (2017)
Netherlands: First Quarter

Canary Islands — LATITUDE OF LIFE

How many are they and how much do they spend?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	110,281	114,725	105,210	131,526	142,610
Average daily expenditure (€)	126.47	114.48	121.45	120.74	134.36
. in their place of residence	89.11	78.09	84.63	85.01	98.84
. in the Canary Islands	37.36	36.40	36.82	35.72	35.52
Average lenght of stay	9.82	11.03	10.52	9.17	8.85
Turnover per tourist (€)	1,153	1,107	1,156	1,053	1,097
Total turnover (> 16 years old) (€m)	127	127	122	139	157
Share of total turnover	29.3%	29.4%	26.6%	24.8%	--
Share of total tourist	27.1%	28.5%	24.7%	24.3%	--

Expenditure in the Canary Islands per tourist and trip (€) [(*)]

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Accommodation [(**)]:	43.80	55.94	50.82	37.06	44.62
- Accommodation	38.22	50.43	44.58	31.93	40.26
- Additional accommodation expenses	5.58	5.51	6.24	5.13	4.36
Transport:	30.70	23.53	36.18	27.37	25.68
- Public transport	8.93	5.83	7.06	3.07	5.20
- Taxi	2.12	5.66	7.47	5.66	6.18
- Car rental	19.66	12.04	21.65	18.65	14.30
Food and drink:	180.82	177.46	192.26	145.81	143.42
- Food purchases at supermarkets	63.47	73.41	85.05	70.10	53.76
- Restaurants	117.35	104.05	107.21	75.71	89.66
Souvenirs:	62.46	61.01	51.98	51.81	37.71
Leisure:	16.30	26.52	27.53	28.35	29.41
- Organized excursions	4.56	10.29	12.93	15.13	10.84
- Leisure, amusement	0.37	2.07	2.08	0.53	5.20
- Trip to other islands	0.21	0.90	1.23	1.55	1.20
- Sporting activities	9.64	6.47	5.51	6.90	6.92
- Cultural activities	1.09	2.40	1.55	3.19	2.63
- Discos and disco-pubs	0.42	4.37	4.24	1.06	2.62
Others:	14.60	12.83	8.77	11.63	92.83
- Wellness	1.92	2.55	1.21	3.99	2.62
- Medical expenses	2.92	2.27	2.76	0.55	0.95
- Other expenses	9.75	8.01	4.80	7.09	89.25

How far in advance do they book their trip?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.0%	0.6%	0.0%	0.8%	0.0%
Between 2 and 7 days	9.5%	5.6%	9.0%	9.7%	7.6%
Between 8 and 15 days	9.3%	11.7%	18.9%	11.9%	9.3%
Between 16 and 30 days	12.8%	15.8%	13.9%	19.0%	13.2%
Between 31 and 90 days	43.6%	33.9%	32.9%	39.5%	39.7%
More than 90 days	24.8%	32.4%	25.4%	19.2%	30.2%

What do they book at their place of residence?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	7.7%	7.3%	6.3%	5.9%	4.5%
Flight and accommodation (room only)	39.7%	34.0%	38.2%	26.7%	33.5%
Flight and accommodation (B&B)	9.9%	10.4%	9.3%	11.5%	11.2%
Flight and accommodation (half board)	22.9%	18.7%	19.2%	26.4%	17.0%
Flight and accommodation (full board)	0.5%	2.4%	2.2%	2.3%	2.2%
Flight and accommodation (all inclusive)	19.3%	27.2%	24.8%	27.2%	31.6%
% Tourists using low-cost airlines	38.1%	32.1%	32.0%	49.2%	34.5%
Other expenses in their place of residence:					
- Car rental	20.7%	13.0%	11.9%	14.5%	14.3%
- Sporting activities	6.7%	2.3%	2.1%	4.2%	4.0%
- Excursions	0.2%	3.2%	1.1%	4.1%	3.8%
- Trip to other islands	4.0%	0.4%	0.5%	0.3%	0.2%

How do they book?

Accommodation booking	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tour Operator	57.1%	51.9%	48.8%	41.5%	45.0%
- Tour Operator´s website	89.9%	81.6%	82.7%	71.2%	87.3%
Accommodation	14.5%	12.0%	9.9%	13.0%	10.0%
- Accommodation´s website	55.8%	84.0%	91.2%	79.9%	79.9%
Travel agency (High street)	20.2%	22.2%	21.9%	18.3%	20.9%
Online Travel Agency (OTA)	8.0%	10.0%	17.7%	25.2%	21.8%
No need to book accommodation	0.2%	3.9%	1.8%	2.1%	2.3%

Flight booking	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tour Operator	61.0%	51.4%	47.3%	42.8%	48.2%
- Tour Operator´s website	86.3%	78.0%	75.1%	61.7%	88.3%
Airline	21.7%	18.9%	18.1%	21.5%	19.8%
- Airline´s website	100.0%	96.4%	96.2%	100.0%	97.0%
Travel agency (High street)	16.4%	20.4%	19.0%	15.3%	18.9%
Online Travel Agency (OTA)	0.9%	9.2%	15.6%	20.4%	13.0%

Where do they stay?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	10.9%	3.8%	4.9%	3.3%	6.6%
4* Hotel	42.2%	34.6%	28.0%	40.1%	35.1%
1-2-3* Hotel	10.6%	16.4%	19.7%	19.0%	13.8%
Apartment	35.8%	41.5%	44.3%	35.1%	41.8%
Property (privately-owned,friends,family)	0.1%	2.8%	1.5%	1.8%	1.0%
Others	0.5%	0.9%	1.5%	0.7%	1.8%

Who are they?

Gender	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Percentage of men	72.8%	50.2%	54.5%	50.7%	47.6%
Percentage of women	27.2%	49.8%	45.5%	49.3%	52.4%
Age					
Average age (tourists > 16 years old)	50.7	50.9	53.5	50.4	51.5
Standard deviation	14.4	14.1	14.5	16.3	13.9
Age range (> 16 years old)					
16-24 years old	2.0%	4.3%	4.6%	5.2%	3.9%
25-30 years old	8.9%	6.4%	5.3%	12.0%	4.1%
31-45 years old	24.3%	23.0%	18.5%	21.8%	24.0%
46-60 years old	31.6%	39.6%	34.3%	25.8%	39.8%
Over 60 years old	33.3%	26.7%	37.2%	35.2%	28.3%
Occupation					
Business owner or self-employed	44.2%	24.4%	21.4%	23.8%	23.0%
Upper/Middle management employee	19.6%	42.6%	37.8%	33.5%	41.3%
Auxiliary level employee	9.4%	6.2%	9.3%	7.3%	7.9%
Students	2.7%	1.6%	1.6%	10.8%	2.5%
Retired	20.9%	21.7%	26.5%	23.1%	22.3%
Unemployed / unpaid dom. work	3.2%	3.5%	3.4%	1.5%	2.9%
Annual household income level					
€12,000 - €24,000	7.0%	10.1%	6.4%	11.1%	9.4%
€24,001 - €36,000	18.7%	16.2%	18.5%	16.1%	10.6%
€36,001 - €48,000	8.4%	21.4%	29.3%	22.4%	15.5%
€48,001 - €60,000	17.0%	13.7%	18.9%	15.7%	21.5%
€60,001 - €72,000	4.1%	13.6%	9.4%	10.7%	12.1%
€72,001 - €84,000	6.1%	6.6%	6.2%	8.8%	6.7%
More than €84,000	38.8%	18.4%	11.3%	15.3%	24.3%

(*) Expense is prorated among all the tourists (even those who have not spent in destination).

(**) Accommodation expenses may seem low because most tourists pay the accommodation before traveling.

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Which island do they choose?

Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	15,217	16,638	16,365	21,248	26,713
- Fuerteventura	15,881	10,152	11,204	14,439	17,580
- Gran Canaria	41,386	45,013	40,524	48,354	49,244
- Tenerife	33,651	38,284	32,093	41,116	42,612
- La Palma	4,000	3,784	4,087	5,370	5,422

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	13.8%	14.6%	15.7%	16.3%	18.9%
- Fuerteventura	14.4%	8.9%	10.7%	11.1%	12.4%
- Gran Canaria	37.6%	39.5%	38.9%	37.0%	34.8%
- Tenerife	30.6%	33.6%	30.8%	31.5%	30.1%
- La Palma	3.6%	3.3%	3.9%	4.1%	3.8%

Who do they come with?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	5.0%	10.0%	9.6%	9.3%	6.2%
Only with partner	67.1%	50.9%	64.7%	63.9%	47.8%
Only with children (under the age of 13)	0.0%	0.6%	0.5%	0.0%	2.9%
Partner + children (under the age of 13)	5.5%	8.9%	5.8%	7.0%	12.5%
Other relatives	1.8%	3.8%	3.7%	4.9%	4.5%
Friends	4.5%	5.8%	6.0%	5.2%	4.9%
Work colleagues	0.1%	0.0%	0.0%	0.7%	0.0%
Other combinations [1]	16.0%	19.9%	9.7%	8.9%	21.1%

* Multi-choise question (different situations have been isolated)

How do they rate the destination?

Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	79.6%	96.3%	92.8%	92.8%	92.8%
Average rating (scale 1-10)	8.02	8.50	8.36	8.46	8.52

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	86.3%	82.0%	83.7%	79.4%	81.8%
In love (at least 10 previous visits)	21.7%	21.3%	21.2%	12.9%	15.5%

Where does the flight come from?

Ten main origin markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Netherlands	38.6%	82.1%	81.4%	42.0%	65.5%
Germany	47.6%	10.4%	8.5%	35.6%	27.7%
Spanish Mainland	13.6%	2.8%	4.9%	10.1%	3.1%
Belgium	0.1%	3.6%	5.2%	9.1%	3.1%
United Kingdom	0.0%	0.6%	0.0%	0.0%	0.4%
Austria	0.0%	0.0%	0.0%	0.0%	0.2%
Ireland	0.0%	0.0%	0.0%	0.6%	0.0%
Switzerland	0.0%	0.0%	0.0%	2.6%	0.0%
Others	0.1%	0.5%	0.0%	0.0%	0.0%
France	0.0%	0.0%	0.0%	0.0%	0.0%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	99.4%	96.9%	94.7%	94.1%	96.0%
Tranquillity/rest/relaxation	34.0%	35.2%	35.8%	38.5%	38.9%
Beaches	33.6%	39.7%	31.0%	29.6%	32.7%
Scenery	21.5%	28.9%	28.7%	23.7%	27.0%
Price	17.0%	11.4%	13.5%	12.0%	11.3%
Security	3.1%	5.0%	5.2%	9.1%	10.7%
Visiting new places	9.9%	5.6%	8.3%	11.0%	10.5%
Suitable destination for children	5.4%	4.2%	2.4%	1.3%	7.4%
Active tourism	1.5%	4.5%	3.6%	5.1%	6.9%
Facilidades de traslado	5.3%	4.2%	2.1%	6.2%	5.0%
Shopping	4.4%	5.1%	6.7%	2.1%	3.9%
Nightlife/fun	7.9%	2.8%	3.5%	1.8%	3.4%
Quality of the environment	6.4%	4.0%	5.0%	5.9%	3.3%
Culture	1.6%	3.2%	1.9%	4.3%	2.6%
Theme parks	0.0%	0.5%	0.5%	0.4%	1.8%
Nautical activities	0.6%	1.8%	1.2%	3.4%	1.7%

* Multi-choise question

What did motivate them to come?

Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	78.4%	73.9%	74.7%	65.6%	69.7%
Recommendation by friends or relatives	24.9%	25.5%	23.5%	22.8%	26.9%
The Canary Islands television channel	0.0%	0.0%	0.4%	0.0%	1.0%
Other television or radio channels	0.0%	0.6%	0.3%	1.9%	0.0%
Information in the press/magazines/books	1.5%	4.2%	3.4%	6.8%	3.8%
Attendance at a tourism fair	1.4%	0.4%	1.3%	1.4%	0.6%
Tour Operator's brochure or catalogue	3.1%	6.0%	4.9%	7.7%	5.2%
Recommendation by Travel Agency	8.8%	7.0%	9.8%	13.6%	9.6%
Information obtained via the Internet	20.1%	23.6%	17.1%	30.3%	28.6%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	3.2%	4.0%	5.8%	5.4%	4.9%

* Multi-choise question

Tourist arrivals trend (> 16 years old) (First Quarter)

Share of tourists (> 16 years old) (First Quarter)

Source: Encuesta sobre el Gasto Turístico (ISTAC). (1) Combination of some groups previously analyzed.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable " and " No answer " have been excluded.